

## **REMARKS**

### **A. Introduction**

In a Final Office Action mailed on August 17, 2007, the Examiner: rejected claims 3 and 10 under 35 U.S.C. § 112, first paragraph; rejected claims 3 and 10 under 35 U.S.C. § 112, second paragraph; and rejected claims 3, 10-12, and 30-35 under 35 U.S.C. § 103(a) over a combination of Pullen (U.S. Publication No. 2004-0064390), Kauderer (U.S. Publication No. 2004-0172311), and ONET ("O\*NET 98 Data Directory," Release 1.0.). Applicant herein amends claims 3, 10, and 30-32 to more clearly identify the subject matter for which applicant seeks protection. Claims 3, 10-12, and 30-35 are pending. For reasons discussed in detail below, applicant submits that the pending claims are now in condition for allowance.

### **B. Rejections Under 35 U.S.C. § 112, First Paragraph**

The Examiner rejected claims 3 and 10 under 35 U.S.C. § 112, first paragraph as failing to comply with the written description requirement. Specifically, the Examiner contends that the specification does not disclose a questionnaire form that "does not specify a current or anticipated job opening" or "non-economic data measure information," as recited by claims 3 and 10. (Office Action, August 17, 2007, pp. 2-3, emphasis original.)

Although applicant disagrees, applicant has amended claims 3 and 10. As amended, claim 3 recites "wherein the questionnaire form specifies one or more data measures associated with an occupation." As amended claim 10 recites "wherein the questionnaire is a structured analysis questionnaire configured to obtain worker measure information related to the required skills for the specified occupation."

Applicant respectfully submits that the specification describes one or more data measures associated with an occupation. For example, the specification describes stress-related work measures, job titles, descriptions, required job skills, physical and mental job

demands, etc. (See, e.g., Specification, ¶¶ [0067]-[0072].) Accordingly, applicant respectfully requests that the Examiner reconsider and withdraw the rejection of claims 3 and 10 under 35 U.S.C. § 112, first paragraph.

C. Rejections Under 35 U.S.C. § 112, Second Paragraph

The Examiner rejected claims 3 and 10 under 35 U.S.C. § 112, second paragraph as indefinite. (Office Action, August 17, 2007, pp. 3-5.) Specifically, the Examiner suggests that these claims are indefinite because they "hav[e] negative limitations, which are not clearly pointed out within the description." (*Id.*, p. 3.) Although applicant respectfully disagrees<sup>1</sup>, applicant has amended claims 3 and 10. Thus, applicant respectfully request that the Examiner reconsider and withdraw the rejection of claims 3 and 10 under 35 U.S.C. § 112, second paragraph.

D. Rejections Under 35 U.S.C. § 103(a)

The Examiner rejected claims 3, 10-12, and 30-35 under 35 U.S.C. § 103(a) over a combination of Pullen (U.S. Publication No. 2004-0064390), Kauderer (U.S. Publication No. 2004-0172311), and ONET ("O\*NET 98 Data Directory," Release 1.0.).

Applicant submits herewith a Declaration under 37 C.F.R. § 1.131 for inventor Thomsen that establishes an actual reduction to practice prior to Pullen's September 26, 2002 and Kauderer's February 24, 2003 effective dates as evidenced by the implementation and demonstration of the eDot software to the Social Security Administration (as reflected in Exhibits A and C). Alternatively, if the Examiner does not find that the cumulative evidence of Exhibits A and C supports actual reduction to practice prior to Pullen's September 26, 2002 effective date, applicant submits that the Declaration for inventor Thomsen establishes conception coupled with diligence from prior to Pullen's

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<sup>1</sup> The MPEP provides that "[i]f alternative elements are positively recited in the specification, they may be explicitly excluded in the claims." (MPEP § 2173.05(i), *citing In re Johnson*, 558 F.2d 1008, 1019, 194 USPQ 187, 196 (CCPA 1977).) Applicant's approach for collecting information associated with a collection of occupational information may (or may not) include job availability information. For example, each time a query regarding a specific job is made, an interest in that job is logged to a job availability survey. (See, e.g., Specification, ¶ [0071], [0075], etc.)

September 26, 2002 effective date (as evidenced by Exhibits A, B, and C) to an actual reduction to practice as evidenced by beta release of the software (as reflected in Exhibits D and E). Accordingly, under either theory applicant respectfully submits that Pullen and Kauderer are removed as references. Because two of the three references are no longer prior art, applicant respectfully requests the withdrawal of the § 103(a) rejection.

Should the Examiner wish to receive further information on the subject matter of the Declaration, the Examiner is encouraged to contact the undersigned representative, as she may be able to provide such information and answer any questions the Examiner may have.

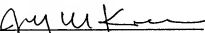
E. Conclusion

Based upon these remarks and amendments, applicant respectfully requests reconsideration of this application and its early allowance. If the Examiner has any questions or believes a telephone conference would expedite prosecution of this application, the Examiner is encouraged to call the undersigned at (206) 359-8077.

Applicant believes no fee is due with this response. However, if a fee is due, please charge our Deposit Account No. 50-0665, under Order No. 333628003US1 from which the undersigned is authorized to draw.

Dated: 2/19/08

Respectfully submitted,

By   
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**IN THE UNITED STATES PATENT AND TRADEMARK OFFICE**

In re Patent Application of:  
David J. Thomsen

Application No.: 10/806,044

Confirmation No.: 9996

Filed: March 22, 2004

Art Unit: 2161

For: SYSTEM AND METHOD FOR PROVIDING  
OCCUPATIONAL INFORMATION

Examiner: C. L. Daye

**Declaration of David J. Thomsen Under 37 C.F.R. § 1.131**

Commissioner for Patents  
P.O. Box 1450  
Alexandria, VA 22313-1450

Sir:

I, David J. Thomsen, declare and state that:

1. I am the sole inventor of the invention described and claimed in U.S. Patent Application No. 10/806,044, filed March 22, 2004, which claims priority to 60/456,838, filed March 21, 2003. This declaration establishes invention in this country prior to February 24, 2003, which is the filing date of U.S. Published Patent Application No. 20040172311 A1 ("Kauderer"), and also prior to September 26, 2002, which is the filing date of U.S. Publication Patent Application No. 20040064390 A1 ("Pullen").

2. I conceived of the invention in the United States, as recited in currently presented claims 3 and 10-12, prior to September 26, 2002. My conception and diligence in reducing the invention to practice is corroborated by a document entitled "Methodology: The enhanced Dictionary of Occupational Titles software and databases" (attached to this Declaration as Exhibit A), which was generated on July 26, 2002. The Methodology document describes the development timeline for the software

embodying the invention ("eDot"), and notes a planned demonstration to the Social Security Administration on September 18, 2002 and beta release of the software in October 2002. My diligence is corroborated by a document entitled "ERI Update: Volume 58" dated July 2002 (attached to this declaration as Exhibit B). The document describes the preparation for an October 2002 release of eDot under my direction. My reduction to practice is corroborated by a screenshot of a SQL Query Analyzer showing data that was received from the submission of a questionnaire for the position of Applications Programmer Analyst on September 4, 2002 (attached to this declaration as Exhibit C). My reduction to practice is further corroborated by information in an archived version of my company's web site ([www.eri-erl.com](http://www.eri-erl.com)), which was obtained using the Internet Archive ([www.web.archive.org](http://www.web.archive.org)) and is dated October 17, 2002 (attached to this Declaration as Exhibit D). The archived version of my company's web site announces the availability of a beta version of the eDot software embodying the invention. My reduction to practice of the invention is further corroborated by a document entitled "ERI Update: Volume 60" dated January 2003 (attached to this Declaration as Exhibit E). This document describes a beta version of the e-DOT product.

3. More specifically, I conceived of a system and method that included providing and collecting information associated with a collection of occupational information including a collection of occupational titles and data measures for each of the occupational titles in the collection (see, e.g., Exhibit A pages 4-5, Exhibit C page 1, Exhibit D, Exhibit E page 3, ¶ 2), providing a publicly available web site for users of occupational information, wherein the publicly available web site allows the users of occupational information to access information associated with the collection of occupational information and to contribute information used to update the collection of occupational information (see, e.g., Exhibit A, page 10, "ERI's 2002 eDOT Development Process"; Exhibit C page 1, Exhibit E page 4, "Job Analysis and Field Audits"); providing access to information recently contributed via the publicly available

web site, wherein the recently contributed information includes information contributed using questionnaire forms accessible from the publicly available web site (*see, e.g., Exhibit A, page 8, ¶ 6—page 9, ¶ 3; Exhibit E page 4-5, "The ERI eDOT Project" Flow Chart*); and updating the collection of occupational information based on receiving a submission of a questionnaire form accessed from the publicly available web site and at least partially completed, wherein the updating includes either (a) adding a new occupational title and the one or more associated data measures to the collection of occupational information or (b) modifying data measures associated with an occupational title that already exists in the collection of occupational information (*see, e.g., Exhibit A page 7, paragraph 4, page 8, ¶ 6—page 9, ¶ 3; Exhibit C page 1, Exhibit E pages 4-5*).

4. The system and method that I conceived of prior to September 26, 2002, further included, for example:

- maintaining a collection of occupational information including descriptions of specific occupations (*see, e.g., Exhibit A, page 4; pages 6-7, "eDOT's attributes"; Exhibit C page 1, Exhibit E page 3, ¶ 2*);
- providing end users with access to the collection of occupational information, including providing access to a questionnaire for receiving input from a user of the collection, wherein the questionnaire is for association with a specified occupation for which information is maintained in the collection of occupational information, and wherein the questionnaire is a structured job analysis questionnaire configured to obtain worker measures for the specified occupation (*see, e.g., Exhibit A, page 8, ¶ 6—page 9, ¶ 3; Exhibit E page 4, "The ERI eDOT Project" Flow Chart*); and
- receiving the questionnaire from the end user; analyzing the information in the received questionnaire; providing the user with results of the analysis of the questionnaire; and updating the collection of occupational information to

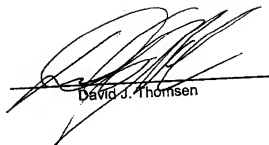
include information extracted from the questionnaire (see, e.g., Exhibit A, page 8, ¶ 6—page 9, ¶ 3; Exhibit C page, Exhibit E pages 4-5).

5. After conceiving of this invention, from prior to September 26, 2002, I pursued it diligently and reduced the invention to practice by at least one or more of the following acts: implementing and testing the invention (e.g., Exhibits A, B, C), demonstrating the invention to representatives from the Social Security Administration on September 18, 2002 (e.g., Exhibit A), releasing to the public a beta version of a software product embodying the invention in October 2002 (e.g., Exhibits D, E), implementing subsequent versions of the software product, participating in the preparation and filing of a provisional patent application, which was filed on March 21, 2003, and filing a non-provisional patent application on March 22, 2004.

6. My implementation of the beta version of the software product is corroborated by the screenshot of a SQL Query Analyzer in Exhibit C. The screenshot depicts data that was received from the submission of a questionnaire for the position of Applications Programmer Analyst on September 4, 2002 (Exhibit C "title" and "studydate"). My implementation of the beta version of the software product is further corroborated by information in an archived version of my company's web page ([www.erieri.com](http://www.erieri.com)), dated October 17, 2002 (Exhibit D). The archived web page indicates that a beta version of eDot was publicly available as of 10/1/2002.

7. I further declare that all statements made herein of my own knowledge are true and that all statements made on information or belief are believed to be true; and further, that the statements are made with the knowledge that the making of willful or false statements or the like is punishable by fine or imprisonment or both under Section 1001 of Title 18 of the United States Code and may jeopardize the validity of any patent issuing from this patent application.

Dated this 19<sup>th</sup> day of Feb, 2008



David J. Thomisen

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# Exhibit A

# Methodology

## The enhanced Dictionary of Occupational Titles software and databases

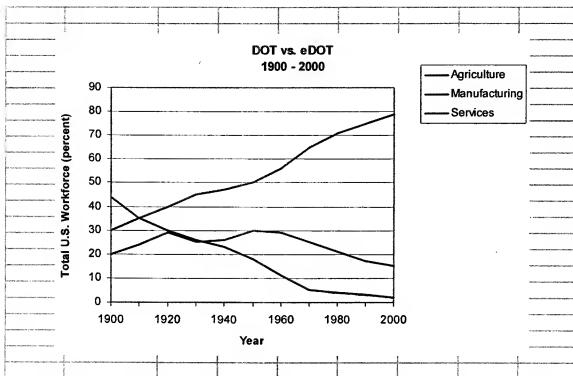
ERI Economic Research Institute serves over 10,000 corporate subscribers in a role that was once filled (internally) by corporate statisticians, operations researchers, industrial engineers, compensation analysts, and similar middle level management support positions that have largely disappeared from Human Resources Departments. At its simplest, ERI collects all available salary and cost of living surveys and data and prepares reports and software analyses by which managers may make decisions. *ERI is an outsource of compensation and benefits research.*

An initial draft of the methodology for ERI's Platform Library's, eDOT, (the enhanced Dictionary of Occupational Titles) software and databases follows (as of: 07/26/02)

**Background: eDOT's Career Transition Focus  
Data Files & Measures  
Planned Screens  
Those Who Might Use the eDOT  
June – September 2002 Development Process**

### Background: Career Transition Focus

When ERI released the first **Salary Assessor** in 1987, it was thought that the U.S. Dictionary of Occupational Titles descriptions could greatly assist in creating the format for draft position descriptions. What was found was that the search criteria (positions common enough to be found in 3 or more salary surveys) created thousands of positions not found in the DOT. Over 80% of **Salary Assessor's** initial jobs were not found among the DOT's 12,000 titles! By the time it had concluded that the DOT was too outdated to use, ERI had adopted its analysis techniques and attributes (SVP, GOE, etc.) and continue to use them today. The graph below illustrates (in less than a thousand words) why the DOT misses the mark today and why the U.S. Government has created an alternative, the O\*Net.



(The DOT was created in the labor rich days of the Great Depression; its first full printed release was in 1939.) Today, the DOT has been abandoned by the U.S. Government and replaced by a job family approach, the O\*Net. The defense of the O\*Net is most often an unknowledgeable attack on the DOT: 1) it was created for a workplace that has disappeared, 2) 12,000 positions exist because writers were paid on the merit system for the #'s of descriptions written, 3) it is too costly to maintain, 4) the modern workplace is filled with interchangeable tasks (fluid positions), etc.

Not said is that the O\*Net, with approximately 1,000 positions, uses job families which are too general to be useful for "career changers" or managers, is focused on the college student/new entrant who can suffice with "accountant or auditor" rather than "cost", "budget" with industry knowledge, was created by a panel of political appointees, and is politically correct (O\*Net does not measure 190 words a minute in reading, it asks whether reading is required). The DOT's 66 analysis measures have been replaced by 632, but none of them is the GOE "career interest" which goes to the core of rehabilitation and career changing analyses. (Another example: the DOT can tell you if the job requires lifting 50 pounds and point analysts to "lesser" jobs that require lifting of 20 pounds. O\*Net has 24 measures of strength: "explosive", etc. but cannot definitively tell one if the job requires lifting of 50 pounds.)

ERI's military analogy is that the U.S. Government assessed the Polish plain and invasion of German tanks and rather than developing attack helicopters (which it could have in this technologically rich age), gathered its cavalry horses together and consolidated them in front of a new O\*Net chariot. It is true that college graduates do not need to consider the difference between cost, tax, budget, forensic, or other accountants and that the general occupation of "accountants and auditors" can suffice for those seeking general information. It is also true that industry specialization and experience within a job (and the related differences in earnings, performance, etc.) is not much interest to Career Entrants. It is not true for those who fight specific battles within mountain passes or ravines, those special niche applications of job measures that require knowledge of specific positions can ever be served well by the new O\*Net.

In October of 2002, ERI is releasing a modified version of its **Salary Assessor** code in the creation of the "eDOT" (a combination of the old DOT and ERI's **Salary and Executive Compensation Assessor** position descriptions and attributes). We do so because of requests from subscribers and users; the following list illustrates the "niches" left un-served by the new O\*Net.

#### **Compensation and Human Resource Planning**

- o Assessor Series Subscribers
- o ERI Distance Learning Center Continuing Education

#### **Career Transition Assessment**

- o Corporate Managers
- o Career Counselors
- o Libraries of all Types
- o Military to Civilian Transition Professionals
- o Employment & Training Specialists
- o Outplacement Professionals
- o Recruiters and Job Placement Specialists
- o College Career Centers
- o Human Resources and ADA Compliance
- o Corrections and Work Release Officers

#### **Rehabilitation and Transferrable Skills Assessment**

- o Social Security (U.S.) Disability Analysts
- o Rehabilitation Specialists
- o Corporate Outplacement
- o Compensation Job Analysts
- o Case Managers and Nurses
- o Attorneys
- o Forensic Economists
- o Vocational Professionals
- o Insurance Company Disability Claims Managers
- o Psychologists and Mental Health Professionals
- o Expert Witnesses (satisfying a Daubert Challenge)
- o Immigration Attorneys

#### **Disability Wage Assessment Library**

- o Those required by regulation to utilize U.S. Government data
- o Audit of other data, including **Assessor Series** use for one survey illustrating a "rate of error" for meeting of Daubert Challenges. The Salary Assessor shows standard error of salary estimates, the eDOT reports standard error of populations (job availability).

#### **ERI Position Description Crosswalk**

- o Everyone

Career Changers or the professionals who assist them are not well served by the O\*Net. ERI has, by design of the **Executive Compensation and Salary Assessors**, been inadvertently updating the DOT. As of October 2002, ERI is now doing this in a more formal way. As some

professionals already say, "ERI is now the DOT" (and we have little fear, outside of blatant theft, that anyone would care to recreate the 15 years of writing new descriptions and analyzing those jobs and compete against ERI's new eDOT).

The eDOT is, however, far more than just an extract of **Assessor** position descriptions. The foundation for transition analyses is the analysis of attributes, worker characteristics, skills, and competencies. Skill words are presented from the *1991 Revised Handbook for Analyzing Jobs* to detail the common skills associated with each WORK field assigned to the selected occupation. Occupations are taken from the text of the U.S. *Occupational Outlook Handbook* (2002-2003) textbook (though not used, only crosswalked).

#### Data Files

- o Complete *1991 U.S. Dictionary of Occupational Titles* (DOT) job descriptions, titles, & codes with the addition of over 3,000 new position descriptions added by ERI (and edits)
- o Companion DOT volume, *Selected Characteristics of Occupations*
- o Occupational Information Network (O\*NET) crosswalks
- o Alternate military and civilian titles (more than 53,000), including U.K., U.N. and Canadian job title variations
- o Worker characteristics information for all occupations: General Educational Development (GED), Specific Vocational Preparation (SVP), Strength, Physical Demands, Working Environmental Conditions, Aptitudes, and Work Characteristics (66 in all)
- o Industry crosswalk among DOT, PBA, SIC, and NAIC codes (2002 edition)
- o Position content crosswalk among, DOT (10 digit), Guide for Occupational Exploration (GOE); Classification of Instructional Programs (CIP); Occupational Outlook Handbook (2000-2001); WORK fields; Material, Product, Subject Matter & Services (MPSMS); O\*NET Codes, Occupational Group Arrangement (OGA); and Data-People-Things (DPT) - Worker Functions, etc.
- o Position Title Crosswalk among U.S. DOT, revised ERI eDOT, U.S. SOC (2), Canadian SOC (2), U.K. SOC (2), UN/Europe ISCO, and historic OES, U.S. Census, etc. (eDOT is a U.S. collection of descriptions; ERI's UK/EU editions of its Assessor Series utilize descriptions unique to those areas (and are not the same as the eDOT descriptions))
- o Job Availability statistics OES 1996 – 2002
- o Major Employers (with more than 100 employees) U.S. Government
- o Occupational reference text with photos: [Occupational Outlook Handbook](#)

#### Measures

##### DOT CODE CHARACTERISTICS

Occupational Group  
Work Group  
Data  
People  
Things  
Reasoning  
Math  
Language  
SVP  
Strength  
GOE

## WORKER CHARACTERISTICS

General Learning Ability  
Verbal Aptitude  
Numerical Aptitude  
Spatial Aptitude  
Form Perception  
Clerical Perception  
Motor Coordination  
Finger Dexterity  
Manual Dexterity  
Eye-Hand-Foot Coordination  
Color Discrimination  
Directing, controlling, or planning activities of others  
Performing Repetitive or short cycle work  
Influencing people in their opinions, attitudes, & judgments  
Performing a Variety of duties  
Expressing Personal feelings  
Working Alone or apart in physical isolation from others  
Performing effectively under stress  
Attaining precise set limits, tolerances, and standards  
Working Under specific Instructions  
Dealing with people  
Making Judgments and decisions

## PHYSICAL DEMAND & ENVIRONMENTAL CONDITIONS

Climbing  
Balancing  
Stooping  
Kneeling  
Crouching  
Crawling  
Reaching  
Handling  
Fingering  
Feeling  
Talking  
Hearing  
Tasting/Smelling  
Near Acuity  
Far Acuity  
Depth Perception  
Accommodation  
Color Vision  
Field of Vision  
Exposure to Weather  
Extreme Cold  
Extreme Heat  
Wet and/or Humid  
Noise Intensity Level  
Vibration  
Atmospheric Conditions  
Injury from moving parts  
Exposure to Electrical Injury  
Exposure to injury from fall  
Exposure to radiation  
Injury from explosive

Exposure to Toxic Chemical  
Other environmental conditions

### Screens

enhanced Dictionary of Occupational Titles with six tabs (initial draft for SSA ... see the attached eDOT.pdf)

Job Attributes    Previous Jobs (II and III)    Assessment – Preliminary    Alternative Jobs    Job Availability

### Supporting Datasets & Programs

From the **View** menu within the enhanced Dictionary of Occupational Titles

- o **Lost Wage Analyses**
- o **Position (53,000) Title Crosswalk**
- o **OES Salary and Population Surveys 1996 - 2002**
- o **U.S. Census Populations 1990 & 2000**
- o **NCS Wage Surveys 1995 – 2002**
- o **Original DOT (1991 edition - without edits)**

eDOT (and the original DOT) is designed for use by professionals and administrators and focuses on "career changers." Abandoned by the U.S. Government, its replacement, O\*Net, is designed for school-to-work entrants. For those starting their careers, ERI recommends the latter and

#### ☐ **U.S. Occupational Outlook Handbook, 2002-03 Edition**

Note the Career Entrance versus Career Change goals of O\*Net and eDOT/DOT. College students may not find the eDOT of use/interest. Those who might use the eDOT (below) will never find the O\*Net of much use.

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#### **eDOT's attributes:**

- o Editor for creating job descriptions in seconds
- o Explore careers by interest, job titles, or skills and attributes
- o Discover whether jobs of interest likely exist in an area
- o Review skills and competencies needed in over 15,000 jobs
- o Compare U.S. Government salary survey data to that from privately conducted surveys for over 53,000 job titles (with Assessor subscriptions)
- o Search for jobs by attributes, skills, attributes, industry, etc. including Boolean combinations and key words within titles or descriptions.

- o Crosswalk of position titles and codes for UK SOC (2), Canada SOC (2) and NOC, U.S. codes (10, including OES, O\*Net, SOC), and European Union ISCO.
- o Analyze job/employment availability utilizing OES job family populations (by 633 geographical areas)
- o Analyze likelihood of job availability using available Census and SESA unemployment data from UK, Europe, Canada, and the U.S. (to be added)
- o Can be utilized with a speech screen reader and screen magnification program for disabled subscribers.
- o eDot has the power to be balanced with ease of use; teaching staff and counselors for those who tend not to have high level computer skills
- o crosswalked to the O\*Net, allows one to apply the strength of both.

#### **Subscribers Include:**

- o Government subscribers to Assessors include the IRS National Appeals Office (a subscriber since 1989), the CIA (Assessors approved at the Senate Oversight Committee level), etc.
- o 10,000 ERI subscribers (typically organizations with 500 or more employees and that have multiple branch office locations).

#### **Search Methods:**

- o Key words in Titles
- o Key words or phrases in Descriptions
- o DOT Code (or any of 20+ other Codes, including UK, UN, and Canadian)
- o Industry (Salary Assessor's over 2,000 NAIC groupings and sub groupings)
- o Interests (GOE)
- o Occupational and Work Groups (1<sup>st</sup> 6 DOT digits)
- o Data-People-Things Work Functions (DPT)
- o Work Field
- o Materials, Products, Subject Matter and/or Services Category (MPSMS)
- o Job Availability
- o Earnings Level (U.S. data only), but all U.S., Canada, U.K., and Europe should subscriptions to the Geographic and Salary Assessor be present
- o Education, including CIP, degree, and U.S. college #s granted

Full or partial U.S., Canadian, and U.K. military titles

#### **Validation via Job Analysis**

ERI utilizes the input from its over 10,000 subscribers who periodically (meaning daily for ERI) review the assigned attributes and descriptions of the eDOT via the Internet or **ERI's Platform Library** CD-ROM. ERI posts new positions and their evaluations as they are created. Subscribers also request that new jobs be added to the eDOT. Analyses steps include:

- ❑ Jobs are added to the eDOT (and **Assessors**) at [www.erieri.com/edot](http://www.erieri.com/edot) after numerous requests and/or whenever the analysis of private salary surveys by ERI salary survey researchers finds a position not now in the eDOT (but which is reported upon by 3 or more surveys).
- ❑ ERI job analysts review posted and requested jobs utilizing the original DOT analysis measures and analysis approach. ERI researchers represent some 200 years of job analyses experience and have a stated goal of analyzing 500 new positions a year. Additionally, ERI researchers are reviewing original DOT



descriptions, including both traits and tasks, with a goal of 1,500 reviews per year. This "cleanup" of the original DOT has been ongoing since 1987.

- ❑ Senior ERI Research Directors review the work of ERI analysts, including the published correlation and standard error when compared to historic DOT evaluations.
- ❑ Subscriber Field Approvals: ERI subscribers review posted analyses and email comments. Every Thursday morning, ERI subscribers review Assessor products, applications, and analyses.
- ❑ Approved descriptions are added to the eDOT. Correlations and/or standard errors of added jobs measures are posted for future experts/court's review.

Since it is impossible for ERI's analysts to review every new job in the field, it must rely upon its subscribers' who oversees these jobs (the typical ERI subscriber manages compensation in an organization with more than 500 employees and that has multiple branch offices). To meet a Daubert Challenge, eDOT stores the attribute correlations and/or standard errors in a sub-directory always available to a subscriber. Date of Last Update, as in the original DOT, indicates existences of these analyses and revisions and is found in the body of all General Descriptions.

#### **A Note Regarding Daubert**

In 1975 the U.S. Congress passed a Rule of Evidence 702 so that a threshold standard for admission "that an expert by knowledge, skill, experience, training, or education may testify in the form of opinion or otherwise." Evidence must be relevant and reliable. For the latter, a four part test exists: 1) it can be illustrated that it can be tested, 2) the data has been subjected to peer review and publication, 3) there is a known or potential rate of error, and 4) there is a level of general acceptance in a particular discipline's community. ERI's **Salary Assessor** that collects and analyzes (combines) data from various salary surveys in an area, faces the dilemma that the calculation of "rate of error" is the square root of a denominator with a known "n", the population of the sample. Since salary surveys completed by different firms often survey the same organizations and never report the exact jobs that make up a survey result, ERI double and triple (and quadruple, etc.) counts when it combines survey results. It can (and does) argue that as an "n" increases, the fraction decreases in size (as the denominator increases) and displays at least one of the non-copyrighted survey sources reported error and populations. For example:

**Compensation and Human Resource Planning** allows one to pull up any job description, edit it (putting in company names, deleting text, adding text, etc.) to create a quick position description for corporate use.

#### **Other Uses**

**Compensation and Human Resource Planning** allows one to pull up any job description, edit it (putting in company names, deleting text, adding text, etc.) to create a quick position description for corporate use.

**Career Transition Planning** utilizes a questionnaire to more fully understand a user/s situation, analyzes unused or desired worker attributes or interests, and then prepares a report that

illustrates the career opportunities, the additional education or training necessary, potential earnings, probable job availability, and possible major employers.

**Rehabilitation Transferrable Skills Assessment – Post Disability Career Planning** also utilizes a questionnaire to more fully understand a user/s situation, analyzes reduced work capabilities, and then prepares a report that illustrates the career opportunities, the additional education or training necessary, potential earnings, probable job availability, and possible major employers.

**Rehabilitation Transferrable Skills Assessment – Lost Wage Analyses** utilizes accompanying Salary and Geographic Assessor subscriptions to analyze both pre and post career earnings (analyses differ by cause: injury/disability, death, wrongful termination, pregnancy, etc.).

**U.S. Government Disability Wage Assessment Library** is made available because although U.S. Government data is either low (OES utilizes O\*Net/SOC job families) or high (such as when GA Letter 2-98 requires the 67<sup>th</sup> percentile), this data is often required in submissions by Regulation.

### **ERI October Introduction of an eDOT**

**HISTORY:** The DOT was first developed in the 1930s as a tool for providing standardized occupational information to support job placement activities. There have been 4 editions and 2 supplements to the DOT with the most recent completed in 1991. This document has been used extensively by professionals in vocational rehabilitation, social security, unions, courts, professional trade associations and others.

The most recent (current) version does not reflect the 2002 economy. Numerous 'high-tech' positions are missing particularly in the information sciences, software and telecommunications (wireless) specializations. Additionally, the job descriptions are 'dated' and rarely reflect the current tools used to accomplish occupational requirements.

Over 2,000 jobs have been created, analyzed and coded by ERI.

The DOT replacement by the Federal government is O\*NET which is a job family approach. Although O\*NET used KSA's (knowledge, skills and abilities) as well as GWA's and work context, the generic job family approach is too broad to satisfy the needs of most vocational coaches. O\*NET plans to "to gather data on 200-300 occupations each year, with the goal of replenishing the database every five years". Even so, it does not ask or analyze the specific measures of the DOT.

Information in O\*NET is available for about 950 occupations with a focus on job family rather than position specific. Each occupational title and code is based on the most current version (1999) of the Standard Occupational Classification system.

O\*NET claims to be utilized by businesses and human resources professionals for:

- Developing job descriptions,
- Recruitment activities to 'expand the pool of quality candidates',
- Define employee and/or job-specific success factors.
- Align organizational development with workplace needs.
- Design competitive compensation and promotion systems.

O\*NET isn't able to satisfy the needs of many practitioners. Consequently, there is an enormous population that relies heavily on the DOT with enhancements from ERI's position pool. More than once, because ERI's Salary Assessor has been updating and adding positions since 1987 using the DOT format, we hear, "ERI will be the DOT of the future".

Consequently, in the Summer of 2002, ERI undertook breaking out the Salary Assessor positions and combining them with the original DOT (while cleaning up the DOT) to produce an eDOT edition.

### **ERI's 2002 eDOT Development Process**

**Phase 1:** Map eDOT positions (over 2,200 have been added since DOT's last update in 1991) to DOT.

- Change the codes to match DOT numerical scheme (some had been arbitrary),
- Evaluate new positions according to the DOT worker traits index,
- Position descriptions need to be review for thoroughness and relevancy.

*Participants* (aka ERI Committee): Marv, Beth, Pat, Andrew, Linda, Jennifer, etc.

**Strategy:** Led by Marv, this process has been initiated including:  
➢ 5 reviewers for all matches for both coding and classification.  
➢ Preliminary evaluations have occurred ... completed in June of 2002.

**Phase 2:** All position descriptions need to be reviewed and modified/edited as need be. This is an ongoing project that has been in motion since 1987. To assure complete matching with the old DOT format:

- About 3,000 position descriptions need to be reviewed for currency, accuracy and thoroughness.
- Additional to date position descriptions can be extracted from various sources on the internet including:
  - Monster.com
  - Dice.com
  - Hotjobs.com
  - And other links .. completed in July of 2002

**Phase 3:** Attribute 66 attributes to all new jobs (estimating these measures using regression techniques and reporting their error rate) predicting the general DOT traits created by the previous Phases analyses.:

- These work measures are described above and are used to log values in any transferable skills analyses.
- Program screens for use of the eDOT descriptions by rehabilitation and other professionals:
  - Identify present job
  - And capture attributes of past jobs
  - Input job measures as to worker characteristics (pre-post)
  - Identify jobs with transferable skills and national salary entry rates
  - Assess job availability within a particular Geographic area

*Datasets:* OES 2002 data, 2000 U.S. Census, ERI Geographic and Salary Assessors.  
This work completed by the end of August 2002

**Phase 4:** Produce a beta eDOT edition for ERI's Platform Library and its October 2002 edition. Have this application ready for a U.S. Social Security Administration review on September 18<sup>th</sup>, 2002.

**Note from the U.S. Social Security Administration re. the eDOT.**

> -----Original Message-----  
> From: Karman, Sylvia E.ssa.gov  
> Sent: Thursday, July 25, 2002 6:04 PM  
> To: 'beth\_blosien@ssaeri.com'  
> Cc: Roth, Shirleen; Fireison, Cara  
> Subject: FW: Attached  
>  
> Beth,  
>  
> First, regarding our visit:

We have made travel plans to meet with ERI in Seattle (Redmond) on  
> September 18. We'll be staying at the Bellevue Hyatt, arriving the afternoon of  
> September 17. We do not leave until the morning of September 19, so we  
> can meet with you nearly anytime on the 18th. Among the SSA contingent  
> will be myself, Shirleen Roth and Cara Fireison. Both Shirleen and Cara are  
> policy analysts on our Vocational Policy Team. A member of the Interorganizational  
O\*NET Taskforce (IOTF), Mary Barros-Bailey, will also meet us at ERI on  
> the  
> 18th. She is a vocational rehabilitation expert.  
>  
> Second, regarding the attachments:  
>  
> When we came across ERI's product, eDOT, we were interested in the fact  
> that  
> ERI was (plans on) updating current DOT job titles, winnowing out  
> obsolete  
> titles, and adding new, emerging jobs--all using the same information  
> format  
> as the DOT. We are reviewing ERI's e-DOT as a possible interim resource  
> for  
> our adjudicators to use while we work with DOL and IOTF to develop a new  
> occupational database. As such, if an interim resource is a possibility  
> for  
> us (legally and pragmatically), we would need the resource to resemble  
> the

- > existing DOT as much as possible--be a plug-in resource, so to speak.
- > Therefore, an enhanced DOT would need to contain information on new
- > occupations that parallel the data already found in the DOT for other
- > occupations. This way we would not need to change our process until a
- > new
- > database is created.
- >
- > Currently, we have a project underway (referred in one of the many
- > documents
- > I sent) to develop methodology to identify, validate and calibrate the
- > requirements of work and the human (physical/mental) demands needed to
- > perform them. Therefore, although we have a fairly good idea what they
- > might be, we haven't done the empirical work to identify, validate or
- > calibrate them (determine the measured scales and thresholds) as yet.
- > We
- > also need to work with Department of Labor (DOL) and the
- > Interorganizational
- > O\*NET Taskforce (IOTF) on methods for identifying the skill level of
- > jobs.
- > Bottomline: we have a lot of work ahead.
- >
- > All that said, we found the prototype eDOT screens very interesting.
- > When
- > we come out to visit ERI in September, a demonstration of the screens
- > would
- > be helpful for us. We'll have lots of questions formulated by then.
- > One
- > concern I might mention is that SSA has not allowed its adjudicators to
- > use
- > automated data programs to perform transferability of skills assessments
- > or
- > to make a determination about a disability case. Historically, SSA's
- > concern has been that the adjudicator should not use a "black box" or
- > automated program to produce a decision. We understand that the
- > attached
- > screens are not intended to be applied that way. I just need to convey
- > SSA's longtime aversion to allowing adjudicators to use automated
- > programs.
- > However, given that nearly all data are reported electronically now, I
- > imagine that SSA's concerns can be accommodated so that adjudicators can
- > use
- > the data and still perform the necessary analysis of all the information
- > relevant to a case to render a decision.
- >
- > Finally, regarding the platform library CD that you sent me:
- >

> Shirleen Roth will probably call you while I'm on vacation (7/26-8/12)  
 > for  
 > some help with the platform and eDOT. Also, we will set up a conference  
 > call with you so that you can talk to Shirleen, Cara and me and help us  
 > work  
 > with the eDOT on the platform. We're aiming for the afternoon of  
 > August  
 > 20. If that's a problem, just let me know. We'll find a better day.  
 >  
 > Anyway. I'll be back in the office on August 12. Talk with you later  
 > in  
 > August!  
 >  
 > Sylvia Karman  
 > 410-965-7693  
 >  
 >

#### **Disclaimer**

This data is provided "as-is" and ERI makes no warranty, either expressed or implied, including but not limited to, warranties of correctness and fitness for a particular purpose. In no event will ERI be liable for any indirect, special, consequential or other damages however caused.

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**Assessor Series** software database access is leased to subscriber.

Re-sale of Assessor Series or Reference Series data is prohibited. Posting of **Assessor Series** data or results on the Internet is also prohibited.

Some rough ideas for part of the story board re edot. Not sure how good we are going to do in predicting the factors which were just audited. So wanted to add the Factor Comparison Technique to story board. Use if you thing it will add anything to story board.

I am working on regression of dot & goe number to predict

data  
 people  
 things  
 math  
 reasoning  
 language  
 svp  
 physical

1) Complete data and people today. Value for people not as good as data.

2) Not able to use onet wages as a variable. Too many jobs in dot do not cross walk to an available national wage reported by onet/soc.

Marv

=====

Thoughts for story board.

1) "Each ERI job was place in it appropriate dot category (1st 3 digits of the dot number) in accordance with the definitions contained in the 1991 edition of the dictionary of occupational titles".

2) "Each ERI was place in the appropriate GOE (Guidance for Occupational Exploration) in accordance with the definitions contained in the xxxxxxxxxxxxxxxxxxxxxxxxxxxx.

3) Based on the 3 digit dot codes and the goe codes, eight multiple regression studies were conducted.

4) The purpose of each study was to statistically capture the relationship among the jobs contained in the 1991 DOT.

For example, Regression Study 1 captured the statistical relationship between the 3 digit dot code, the GOE code and the respective jobs data code.

The mathematical relationship resulting for the study of existing jobs in the 1991 DOT was then applied to the Job Descriptions written by ERI.

5) This process resulted in a estimated rating for the "data" factor for each ERI job. The correlation value and the standard error for each of the 8 studies is listed below.

TABLE

Factor	correlation	standard error.
--------	-------------	-----------------

data	xxxxxxx	xxxxxxx
people	xxxxxxx	xxxxxxx
thing	xxxxxxx	xxxxxxx
math	xxxxxx	xxxxx
reasoning		
language		
svp		
physical		

6) After the estimated (predicted values) were calculated for the ERI jobs via the multiple regression equations, ERI analysts reviewed the each ERI job on a factor by factor basis.

7) The review technique used by ERI analyst was the Factor Comparison Technique. Both the ERI jobs and jobs from the 1991 DOT were listed for each factor and grouped by the first 3 digits of the DOT code. Analyst reviewed the predicted rating for each ERI job to comparable jobs from the 1991 DOT. Based on this review adjustments were made to the ERI code assignment

where the predicted values was not fully consistent comparable established jobs in the 1991 DOT.

For the data factor xxxx of xxxx ERI jobs had and adjustment as a result of the factor comparison. For the people factor, xxxx of xxxx ERI jobs had and adjustment as a results of the factor comparison process.  
etc.

As such, it would be ERI opinion the standard errors stated above over state the true standard errors of the ERI factor ratings as further improvements have been made to the accuracy of the ERI rating through the Factor Comparison Technique employed by ERI analysts.

Thus it would be safe to assume the standard error rating of each factor would never exceed and would most likely be less than those stated in the above table.



## Exhibit B



# ERI UPDATE

Quarterly Notes For ERI Subscribers

## Training New Analysts

Two years ago the AICPA (American Institute of Certified Professional Accountants) asked that ERI (via their Affinity Program) develop 75 compensation & benefit courses specifically designed for a CPA wishing to become proficient in pay practice consulting. The result is that ERI Economic Research Institute:

- 1) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor on its National Registry
- 2) has an educational site at [www.eri.dlc.com](http://www.eri.dlc.com)
- 3) and offers all these courses **FREE OF CHARGE!**

**Course:**  
 01: Preparing to be an Expert Witness

**Congratulations! You have completed Course 01: Preparing to be an Expert Witness.**

You should now be able to:

- Establish guidelines for preparing to serve as an expert witness
- Explain how to limit one's testimony to the question rendered
- Identify common pitfalls and issues that may tip up an expert witness
- Provide answers to complex and tricky questions often heard in court

If you would like to test your mastery of this material, please proceed to the final exam.

If you have taken this course as a management or university training exercise and need to report your completion of the reading and correct answering of the memory jogger questions, please enter your supervisor or instructor's email address here.

(In: [eripublisher@eri.dlc.com](mailto:eripublisher@eri.dlc.com))

[Send Feedback](#) [Print Exam](#)

Review available and planned courses at [www.eri.dlc.com](http://www.eri.dlc.com)

This means:

- ERI subscribers can use ERI DLC to train new analysts (in the spare time that some have as they begin to learn their trade) at no cost.
- Each course consists of 20 - 30 pages of prose and exercises. Before one can leave a course page, a "memory jogger" question must be answered correctly. Assign a course to a new hire. On the last page of the course the new analyst can enter your e-mail address to automatically notify you that the course material has been completed.
- If you teach college level compensation & benefit courses, ERI DLC courses are excellent homework assignments!

Consultants, CPAs, and lawyers pay a final exam test fee of just \$19 (after they take a course) should they wish to receive CE/CPA/CLE credits. SHRM's PHR/SPHR recertification credits also apply.

## A New Platform Look

Over a dozen ERI researchers are busy working on an enhanced Dictionary of Occupational Titles (now that the U.S. Government has

**ERI's Platform Library**  
 enhanced Dictionary of Occupational Titles (DOT) License Expires 12/31/02

Geographic Assessor  
 Salary Assessor  
 Relocation Assessor  
 Executive Compensation Assessor

Self-Study | Update Data

forever trashed the DOT text in favor of the O\*Net). ERI's version will incorporate ERI's Platform Position Crosswalk, the old DOT, over 3,000 new jobs found in the Salary and Executive Assessors, the U.S. Census and NCS data, and UK and European job descriptions and codes. Preparing for October 2002, we have simplified the Platform "look." Free raw data and sources are to be found under "Resources." Note that the map changes color for Salary and Geographic Assessor subscribers, indicating whether the North American edition or the UK/European edition is active (or both).

## Assessor Additions for July 2002

Executive Compensation Assessor subscribers can look for the expanded revenue range to \$30 billion. Other subscribers should look for the addition of 400 new cities/areas to ERI's databases.

## 2003 Salary Increase Planning

After September 11<sup>th</sup>, major consulting firms led a stampede in their shared agreement that organizations had immediately decreased their 2002 salary increase plans from ~4.0% to ~3.0%. ERI's late 2002 merit increase survey of its subscribers (our November survey had 1,652 organizations\*, most other surveys had far fewer) found only a 0.1% (point 1) decrease. Interestingly, we believe that the variance was the reporting methodology (other firms reported a simple average of companies; ERI reported a weighted average adjusting for population). You can participate in ERI's 2003 Planning Survey at our web site (on the top bar). Survey results will be free to participants. Beware of simple averages.

**COMPENSATION SURVEY 2003**

REQUIRED fields indicated by \*

Title Name  
 Last Name  
 Company Name  
 E-mail  
 Country  
 State/Province

EST. # of Employees

\*1. What was your organization's 2002 merit structure percentage?

general population %  
 production staff %  
 management %

\*2. What was your 2003 merit increase goal?

general population %  
 production staff %  
 management %

\*Survey report: [www.eri.dlc.com/Platform/Survey/Statistics/2002/surveyreport.pdf](http://www.eri.dlc.com/Platform/Survey/Statistics/2002/surveyreport.pdf)

# RESEARCH NOTES

## Assessor Training

Don't forget that ERI offers in-depth, free weekly Assessor Series training sessions called Conference Call Symposiums. Typically, the first half hour of every Thursday's chat is filled with helpful hints on Assessor usage, while the latter half answers the difficult, and often very interesting, analyses questions. Sign up for these Symposiums on our website at [www.eri.com](http://www.eri.com) (under Subscriber Resources)

**ECONOMIC RESEARCH INSTITUTE**

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**CONFERENCE CALL SYMPOSIUMS**

Below is a list of the conference calls that have been scheduled for the month of May:

Date	Time	Topic
05/02/02	9:00 AM	Geographic Assessor: ERI
05/02/02	10:00 AM	Executive Compensation Assessor: ERI
05/02/02	11:00 AM	Salary Assessor: ERI
05/02/02	12:00 PM	Wage Assessor: ERI
05/02/02	1:00 PM	Management Assessor: ERI
05/02/02	2:00 PM	UK/EU Data Assessor: ERI
05/02/02	3:00 PM	Canada Assessor: ERI
05/02/02	4:00 PM	Euro Countries Assessor: ERI

NEXT MONTH'S SCHEDULED CALL IS: 06/02/02 10:00 AM - 11:00 AM - UK/EU Data Assessor: ERI

## Unemployment

At the time of this writing the present labor market has not caught up with the seemingly rosy health of the U.S. economy. For many, the recession continues as job availability has not matched sales and profit growth.

ERI expects unemployment rates to fall, putting further pressure on wage and salary levels.

Original Date Value												
Section 361	LPR02000000											
Section 361A	LPR02000000											
Section 361B	LPR02000000											
Section 361C	LPR02000000											
Section 361D	LPR02000000											
Section 361E	LPR02000000											
Section 361F	LPR02000000											
Section 361G	LPR02000000											
Section 361H	LPR02000000											
Section 361I	LPR02000000											
Section 361J	LPR02000000											
Section 361K	LPR02000000											
Section 361L	LPR02000000											
Section 361M	LPR02000000											
Section 361N	LPR02000000											
Section 361O	LPR02000000											
Section 361P	LPR02000000											
Section 361Q	LPR02000000											
Section 361R	LPR02000000											
Section 361S	LPR02000000											
Section 361T	LPR02000000											
Section 361U	LPR02000000											
Section 361V	LPR02000000											
Section 361W	LPR02000000											
Section 361X	LPR02000000											
Section 361Y	LPR02000000											
Section 361Z	LPR02000000											

## Renew Your

## Subscription Early

If you are a subscriber and have not yet renewed your subscription for next year, a Year 2003 renewal offer accompanies this ERI Update. To conserve postage and packaging, ERI sends out the following year's subscription renewal with the last two quarterly releases of the preceding subscription year. Payments received before October 2002 will be at price levels unchanged since 1998.

## Executive Compensation

It has been widely reported that executive pay is decreasing in 2002. April/May proxy analyses indicate that this may not be true as can be seen below:

Every few months a 5<sup>th</sup> Thursday occurs, and ERI likes to take advantage of the "bonus" Thursday to discuss new product research. May 30<sup>th</sup> was spent discussing the ongoing research associated with ERI's new enhanced Dictionary of Occupational Titles (eDOT). August 29<sup>th</sup> will be dedicated to the research related to the UK/EU data in the Salary and Geographic Assessor.

## Early Increase Estimates for 2003

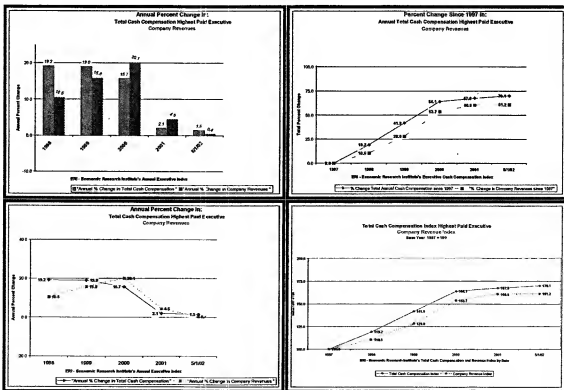
US	
Wage	3.8%
Salary	3.9%
Management	4.0%

Canada	
Wage	3.5%
Salary	3.6%
Management	3.8%

UK	
Wage	4.3%
Salary	4.6%
Management	4.8%

Euro Countries	
Wage	4.8%
Salary	5.1%
Management	5.4%

As of 5/30/02, see [www.eri.com](http://www.eri.com) for 2003 Pricing. Review quarterly with change or day in calendar.



# ERI PRODUCT ORDER SHEET

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800.627.3697

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- ☐ **Relocation Assessor®** ERISA Annual subscription \$789. \$ \_\_\_\_\_
- ☐ **Geographic Assessor®** ERISA Annual subscription \$789 (UK edition £289). \$ \_\_\_\_\_
- ☐ **Executive Compensation Assessor™** ERISA Annual subscription \$2,289. \$ \_\_\_\_\_
- ☐ **Benefit and Compensation Administration Assessor®** ERISA Complimentary.
- ☐ **ERI's Platform Library™ and DLC Wizard™** ERIFL Complimentary.

## REFERENCE SERIES Single, annual hard-copy editions

- ☐ **Geographic Reference Report 2002** \$389. \$ \_\_\_\_\_
- ☐ **International Reference Report 2002** \$389. \$ \_\_\_\_\_
- ☐ **Enhanced Dictionary of Occupational Titles (eDOT) 2002** \$389 (hard copy) \$ \_\_\_\_\_  
CD-ROM \$49 LAN edition \$89 (release date Oct 2002)

## PRODUCT SUITE SERIES

- ☐ **Full Analyst's Series FAS** Single User License: \$1,889. \$ \_\_\_\_\_  
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- ☐ **Complete Consultant's Series CCS** Single User License: \$2,889. \$ \_\_\_\_\_  
Annual subscription (four quarterly updates) to ERISA, ERIRA, ERIGA, ERIGA  
(with UK & European editions as available)

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Additional 75% for a LAN license. Add 50% for each additional LAN user above 2.

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# INSTALLATION GUIDELINES

## NEW SUBSCRIBERS: ORDER/INSTALL ERI'S SOFTWARE FROM THE INTERNET

For those who have access to the Internet, Assessor Series applications (ERIGA, ERISA, ERIRA, ERIXA, ERISA-UK/EU, ERIGA-UK/EU, and eDOT) may be purchased, downloaded and installed from [www.eri1.com](http://www.eri1.com).

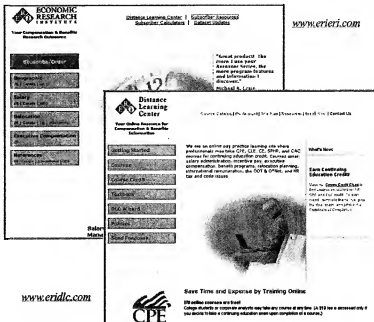
1. From ERI's home page (left-hand side, top) click "Subscribe/Order."
2. Complete the required information and follow the instructions to download and install the applications.

ERI's Platform Library & DLC Wizard may also be downloaded and installed from the Internet (at no charge).

1. On the left-hand side of ERI's web site, click "Subscribe/Order."
2. Complete the required information and follow the instructions to download and install the applications.

## NEW SUBSCRIBERS: ORDER AND INSTALL ERI'S SOFTWARE FROM A CD-ROM

1. Run ERI's Platform Library & DLC Wizard CD-ROM (see related instructions below).
2. Select To Install | Order & Install Latest Assessors from this CD.
3. Complete the Order Form; select the products and the number of subscriptions you would like to purchase.
4. Scroll to the end of the Order Form and click the "Phone Orders - Install from CD-ROM" button.
5. Follow the instructions as they appear on your screen.



## CURRENT SUBSCRIBERS: UPDATE ERI'S SOFTWARE FROM CD-ROM

1. Run ERI's Platform Library & DLC Wizard CD-ROM (see related instructions).
2. You will be automatically prompted to update the Assessor Series software and databases to the new quarterly release. Follow the instructions as they appear on your screen. Unless you change PCs during a year, you need to enter a License Code only once.

## CURRENT SUBSCRIBERS: UPDATE SOFTWARE FROM THE INTERNET

1. Go to [www.eri1.com](http://www.eri1.com).
2. Click "Dataset Updates."
3. Scroll down the screen and click on the Assessor Series product you would like to download, install and update.
4. Follow the instructions as they appear on your screen.

(Please note: It is not necessary to run an installation using a license code each quarter. If you have installed using a license code during the current subscription year at least once, then you may utilize the "automatic update" for all of the following quarters.)

## HOW TO RUN ERI'S PLATFORM LIBRARY & DLC WIZARD CD-ROM

1. Check the date printed on the front of the CD-ROM to make sure that it is for the most recent quarter.
2. Place the CD-ROM in your CD-ROM drive and shut the drive door.
3. The CD-ROM should auto-run. (Approximately 5 seconds after you close the drive door; the CD-ROM drive light should start to blink and you should hear the CD-ROM running. After another 5 - 10 seconds, you should see the Platform Library beginning to load on your computer screen.)

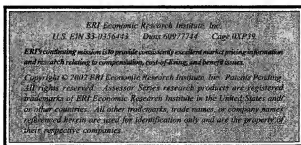
If after 30 seconds the CD-ROM does not auto-run, please contact your organization's internal technical support department. Something may be wrong with your CD-ROM drive or the device drivers. Try to run the CD-ROM on another computer or try using the following secondary procedure:

1. Click the Windows Start button.
2. Click Run.
3. Type d:\eri.exe (assuming that d:\ is your CD-ROM drive — type a different drive letter if necessary).
4. Click the OK button.

## GENERAL INSTALLATION INFORMATION

ERI's software applications are designed to run on Windows 98, NT, 2000, ME and XP. Each quarter, a CD-ROM is mailed to subscribers from which all software applications may be installed. In addition, all software applications may be downloaded and installed from the Internet. For more information on installation options, please select **Help | Topic Search** from any of ERI's software applications and search for related topics using the keyword "installation," or visit ERI's on-line Technical Support at [www.eri1.com/techsupport/](http://www.eri1.com/techsupport/). (See "Subscriber Resources")

Better yet, sign up for a Thursday morning one-hour telephone conference symposium at [www.eri1.com/symposiums/ConferenceCalls](http://www.eri1.com/symposiums/ConferenceCalls).



# Exhibit C



# Exhibit D



[View Items](#) | [Checkout](#)

## ERI's Platform Library, enhanced Dictionary of Occupational Titles, and DLC Wizard

ERI's Platform Library<sup>2</sup> was created as a Windows platform from which all Assessor Series<sup>3</sup> software might be more effectively run (execution and disk speeds are enhanced). It contains ERI's enhanced occupation titles and the DLC Wizard.

The DLC Wizard allows CPAs, attorneys, agents, corporate analysts, and students to take ERI Distance Learning Center courses within a program "framework" that automatically runs and accesses course related programs, references, and materials more...

### 7e-DOT, enhanced Dictionary of Occupational Titles



The U.S. Department of Labor last published its Dictionary of Occupational Titles in 1977 with over 12,000 positions described (a minor update was released in 1991). No further releases are planned as O\*Net and its SOC codes have replaced the 7DOT in its entirety. ERI is presently maintaining these DOT descriptions, along with specific functions (SVPs, etc.). To our knowledge, we are the only organization in the world assisting rehabilitation counselors, forensic economists, immigration attorneys, and a host of other professions that have come to rely upon the DOT. We know of no other firm with job analysts validating job functions, levels, and demands.

ERI's new 7e-DOT combines the prose of this discontinued U.S. edition with consensus descriptions developed from over 2,000 salary surveys along with consensus prose from US, Canadian, Europe, UK, and UN job descriptions. e-DOT crosswalks with UK nomenclature, UN, UK and European codes and their Canadian and U.S. counterparts (using over 54,000 position titles). ERI's Platform Library combines the former with these ~3,000 new position descriptions written by ERI researchers as "consensus" job descriptions. In total, over 15,000 position descriptions are now available. One never needs to "start from scratch" in writing job descriptions; just import these already written descriptions into whatever word processor you use. Use the crosswalk of 54,000 titles to find the closest comparable positions.

The e-DOT is available as a software application only. A beta version of the e-DOT is available as of 10/1/2002.

### The DLC Wizard



The DLC Wizard is a virtual picture frame that surrounds ERI's

Order Online  
Order by Mail/Fax  
1.800.627.3697  
Salary Assessor  
Relocation Assessor  
Executive  
Compensation Assessor  
Geographic Assessor  
Reference Reports  
Full Analysts  
Complete Consultants  
ERI's Platform Library,  
enhanced Dictionary of  
Occupational Titles, and  
DLC Wizard

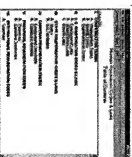
### Platform Library and every ERI Distance Learning Center

("DLC") course. It automatically accesses seven Internet and PC based resources and analyses unique to that course, creating a unique learning experience. The DLC Wizard is fast! It frees students from system problems by loading analyses programs and reference URLs while they are taking the first part of any course. (Patent Pending, as are submissions for CPE, CE, and MCLE continuing education credits in the U.S., Canada, and the U.K. DLC courses may be taken without use of the Wizard.)

ERI's Platform Library also includes 5 non-copyrighted datasets that can be useful in compensation & benefits management. ERI has collected this data for interested Human Resource professionals (CD-ROM drive & Windows required). Complimentary databases include:

#### Compensation & Benefits Tax Code & Laws

Have you ever wished to quickly review what the Americans with Disabilities Act states regarding position descriptions? Have you wanted to review exactly what the U.S. Tax Code states regarding constructive receipt? Have you ever read the Tax Code's discrimination requirements for self-funded medical plans, child care, group life insurance, etc.? Now it's possible to review these and thousands of other Tax Codes and Laws that specifically affect compensation & benefits. Also, now that states are allowed to preempt ERISA with legislation that affects employee medical benefits, you may need to keep up with the latest in multi-state codes that affect COBRA, enrollment, and other practices and forms. There is no longer the need to send someone to the library to research these issues. The answers are just two clicks away! In this compendium created specifically for a compensation and benefits manager. See the Wall Street Journal's link to this data.



#### U.S. Census Workforce Demographics

The U.S. Census provides raw data results that are unusable (or impractical to use) for most HR practitioners. Now ERI has taken this data and broken it down by counties, matching the areas reported upon by both the Relocation and Geographic Assessors. The ultimate goal is to allow subscribers the ability to select a city map, perhaps define four or five areas/suburbs within that city and then extract the workforce composition (White Non Hispanic, Black, Asian, North American Indian, Hispanic, Male, Female, etc.) that existed on the census date and/or a projected date. Subscribers will be able to combine this review with other reviews of housing and other cost-of-living issues and labor market rates, etc. that exist within that selected area(s) using the Assessor Series. (Census 2000 data is not yet available.)

Area	White Non Hispanic	Black	Asian	North American Indian	Hispanic	Male	Female
Area 1	1000	200	50	10	50	500	500
Area 2	800	150	40	8	40	400	400
Area 3	600	100	30	5	30	300	300
Area 4	400	80	20	3	20	200	200
Area 5	200	40	10	1	10	100	100

#### Proxies / 10-Ks / Appraisal Norms



Company	Year	Executive	Compensation
ABC Corp	1994	John Doe	\$1,200,000
DEF Inc	1994	Jane Smith	\$850,000
GHI Ltd	1994	Robert Brown	\$950,000
JKL Co	1994	Sarah White	\$700,000
MNO Corp	1994	Michael Green	\$1,100,000
PQR Inc	1994	Linda Black	\$600,000
STU Ltd	1994	David Gold	\$1,300,000
VWX Co	1994	Emily Silver	\$500,000
YZA Corp	1994	Christopher Copper	\$1,400,000
BCD Inc	1994	Amanda Zinc	\$400,000

You may now retrieve proxies, 10-Ks, and appraisal norms for any of 10,000 publicly traded companies. The SEC now requires corporations (with stock that trades publicly) to report electronically to the SEC, including copies of annual proxies. Proxies, of course, include executive

compensation data, and this reporting, too, has new requirements. At least five officers? pay are now detailed in each proxy, allowing for the instant creation of an executive compensation database that is complete to the extreme (stock options, imputed values, perquisites, deferred compensation, along with easily read tables of direct cash compensation, bonuses and salaries). ERI researchers examine these proxies and extract direct compensation data for ~ 2,000 industries. This data is used for Executive Compensation Assessor analysis. You may retrieve these proxies and 10-Ks yourself, along with extracted appraisal norms. Save yourself hours of time using ERI's retrieval programs.

### Comparables Listing

The Comparables Listing software provides instantaneous financial averages derived from the internet, profiling the closest publicly traded corporations within a specified industry (SIC/PBA/NAIC), geographic (zip code) area, size dimension (assets or revenue), and/or year (any year 1994 to the present). Customized financial norms with 10-Ks are of interest to Investment Managers, Litigation Consultants, Board of Directors, Appraisers, Forensic Economists, as well as Compensation Managers and Consultants. (Available only from ERI's Platform Library for Complete Consultant Series subscribers.)

More Information....

### System Requirements:

Disk Space: 390MB  
RAM: 32MB  
Processor Speed: 300MHz  
O/S: Windows 98, 2000, NT, ME and XP

Enhanced Dictionary of Occupational Titles (eDOT)

Price: **\$89.00**

Add to Cart

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# Exhibit E



# ERI UPDATE

Quarterly Notes For ERI Subscribers

## ERI's Platform Library

With the development of the enhanced Dictionary of Occupational Titles, we have created a job title list of 100,000 position names (made possible by the 2000 U.S. Census collection of common occupational titles). To make this large file (and many other crosswalks) available on the CD-ROM, we have expanded our websites to include the new sites noted at the right, accessible directly from the January 2003 ERI's Platform Library (should an Internet connection be active).

[www.eridlc.com](http://www.eridlc.com) - ERI now offers SHRM HRCI recertification credits

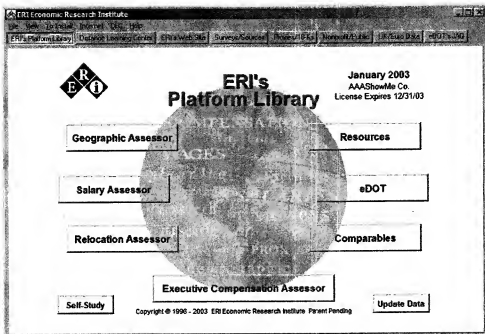
[www.eri-er.com](http://www.eri-er.com) - Home page - all free data is available from this site

[www.eri-salary-survey.com](http://www.eri-salary-survey.com) - 2003 Salary Planning Survey

[www.eri-er.uk.co](http://www.eri-er.uk.co) - British and European Assessor Series editions

[www.eri-executive-compensation.com](http://www.eri-executive-compensation.com) - Black-Scholes calculator

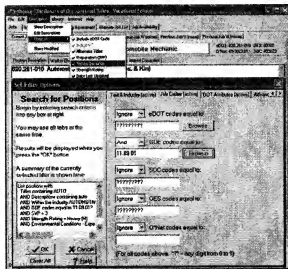
[www.eri-nonprofit-salaries.com](http://www.eri-nonprofit-salaries.com) - Nonprofit analysis program



## Free Datasets

- ☐ 2,000 surveys, sources and their URLs
- ☐ Survey sources selected by industry, geographic area, year and position title
- ☐ Proxies/10-Ks/Summary Comp and Financials
- ☐ Derived Comparables
- ☐ U.K. Annual Reports
- ☐ IRS Nonprofit Form 990s
- ☐ HR Tax Codes & Laws
- ☐ Assessor Tutorials
- ☐ Lost Wage Analyses
- ☐ Historic DOT (1991 Edition)
- ☐ U.S. 2000 Census Data
- ☐ U.S. 1996 - 2003 OES Data
- ☐ OES data "for use in 2003" for immigration applications/reporting
- ☐ all ERI Distance Learning courses
- ☐ Course indexes crosswalk to Assessor Series applications

## ERI's new enhanced Dictionary of Occupational Titles



Quick Boolean searches for ~100 SCOs and crosswalks are available. See pages 3 - 5 for more details. A note for Assessor Series subscribers:

Geographic, Salary and Executive Compensation Assessor regression lines cut through "real salary survey" data and do not use the job analysis/evaluation construct of the eDOT or any other type of job content regression model. eDOT is new, so we have no idea of its predictive capabilities.

## 2003 Symposiums

### eDOT, Job Analyses, Validation & Utilization

ERI has reserved January 20-21 at the Camelback Inn in Scottsdale and August 25-26 at the Banff Springs Hotel in Canada for up to 40 participants. These conferences are for those interested in job analysis, web applications, statistical analyses and presentation case studies (expert witness use of the eDOT). Join ERI researchers in renewing skill sets that have all but disappeared from the "human capital management" arena. To register, go to [www.eridlc.com](http://www.eridlc.com). (HRCI re-certification credit is available.)

# NOTES

## U. S.

Jan 2003

Geographic Reference Benchmark Positions	Median Salaries
Accountant	46577
Accounting Clerk	26210
Administrative Assistant	35365
Aircraft Mechanic	49326
Automobile Mechanic	47373
Bank Teller	19078
Benefits Analyst	43733
Biologist	43936
Bookkeeper	30600
Bus Driver	27755
Buyer/Purchasing Agent	49656
Carpenter (Gen/Maint)	32482
Cashier	19946
Chemical Engineer	68094
Chemical Technician	37218
Chemist	52863
Civil Engineer	56066
Computer Operator	33358
Computer Programmer	60907
Computer Programmer Lead	64515
Construction Worker	30283
Controller Top Corporate	113842
Corporate Attorney	79648
Cost Estimator	44380
Data Entry Operator	23424
Dental Assistant	22422
Dental Hygienist	49180
Drafter	43220
Electrical Engineer	70488
Electrician - Certified	48574
Electronics Assembler	24596
Electronics Technician	44841
Engineering Technician	44841
Executive Secretary	36505
File Clerk	20207
Food Service Worker	12107
Fork Lift Operator	26345
Gate Guard	20754
General Clerk	21644
General/Institution Cook	23275
Graphic Designer	41650
Heavy Truck Driver	31894
Insurance Claims Adjuster	46509
Internal Auditor	52460
Janitor	20263
Librarian	43504
Light Truck Driver	25236
Machine Tool Operator	30157
Machinery Mechanic	35222
Machinist General	41386
Maintenance Helper	23094
Maintenance Worker	28067
Market Research Analyst	52724
Materials Handler	24679
Mechanical Engineer	64336
Medical Lab Technician	41862
Messenger	19660
Millwright	42396
Office Manager	46639
Order Clerk	55047
Painter/Paperhanger	33345
Payroll Clerk	27496
PC Specialist	43322
Personnel Analyst	45386
Personnel Clerk	28542
Pharmacist	80233
Physical Therapist	52304
Physician	158569
Physicist, PhD	81506
Plumber	41914
Primary School Teacher	40633
Production Supervisor	50693
Property Manager	50170
Receptionist	21461
Registered Nurse	48420
Sales Representative	48811
Secondary School Teacher	40650
Secretary	27431
Secretary to CEO	48561
Security Guard	26490
Shipping Clerk	26484
Stationary Engineer	46998
Systems Analyst	66146
Systems Analyst Lead	77618
Tool & Die Maker	40567
Warehouse Worker	27433
Welder	33932
Word Processor	29945

(U.S. dollars)

## Reference Report Notes

ERI's Geographic Reference Report 2003 was published and released in November 2002. The Reference profiles 298 North American cities, combining key data summaries from ERI's Geographic Assessor, Salary Assessor, and Education Assessing databases. Salaries for 88 benchmark positions, the cost of living, wage and benefits, and other key indicators for 265 U.S. and 33 Canadian cities are provided. This January 2003 newsletter lists the U.S. and Canadian national norm salaries (as of 01/01/2003).

## The January Rush

The January 2003 edition of ERI's Platform Library and DLC Wizard CD-ROM, as well as the ERI Update newsletter, are mailed as early as possible each December. Did you know that as a paid 2003 subscriber, all four Assessor Series updates are available for download via the Internet, usually well in advance of the first day of the quarter? Please visit [www.eri.com](http://www.eri.com) and click "Subscriber Dataset Updates" for more information.

## Thursday Morning Conference Calls

Each Thursday morning at 11:00 AM (Eastern Time), ERI hosts a one-hour interactive Conference Call featuring one of the Assessor Series programs. The conference schedule may be viewed at [www.eri.com](http://www.eri.com); see Free Analyst Resources.

**CONFERENCE CALL SYMPOSIUMS**

Date is a list of the conference calls that have been scheduled for the month of December.

December's Scheduled Conference Calls:

Date	Time	Topic	Registration Fee	Details
12/02/02	8:00 AM	Education Assessor - Details	Free	Details
12/03/02	8:00 AM	Production Assessor - Details	Free	Details
12/04/02	8:00 AM	Education Assessor - Details	Free	Details
12/05/02	8:00 AM	Salary Assessor - Details	Free	Details
12/06/02	8:00 AM	Salary Assessor - Details	Free	Details

OR REGISTER FOR THE FOLLOWING SYMPOSIUMS:

The first 30 minutes of each FREE Conference is intended to introduce new subscribers to the featured Assessor Series application. The last half of the hour will be in-depth and as complex as the participants desire.

## ERI Distance Learning Center

All courses are free! We have designed this site to assist you in training corporate analysts who are new to compensation.

## Canada

Jan 2003

Geographic Reference Benchmark Positions	Median Salaries
Accountant	47640
Accounting Clerk	29413
Administrative Assistant	41511
Aircraft Mechanic	51758
Automobile Mechanic	48378
Bank Teller	23488
Benefits Analyst	50640
Biologist	46586
Bookkeeper	33834
Bus Driver	30544
Buyer/Purchasing Agent	62881
Carpenter (Gen/Maint)	39803
Cashier	20898
Chemical Engineer	71262
Chemical Technician	42813
Chemist	55681
Civil Engineer	62370
Computer Operator	37902
Computer Programmer	61433
Computer Programmer Lead	64341
Construction Worker	36243
Controller Top Corporate	107570
Corporate Attorney	81887
Cost Estimator	48569
Data Entry Operator	26143
Dental Assistant	29637
Dental Hygienist	53163
Drafter	47058
Electrical Engineer	67048
Electrician - Certified	48483
Electronics Assembler	28445
Electronics Technician	50983
Engineering Technician	45907
Executive Secretary	44248
File Clerk	28426
Food Service Worker	21682
Fork Lift Operator	31767
Gate Guard	23506
General Clerk	26445
General/Institution Cook	29350
Graphic Designer	42490
Heavy Truck Driver	36031
Insurance Claims Adjuster	48513
Internal Auditor	50987
Janitor	27359
Librarian	47420
Light Truck Driver	30324
Machine Tool Operator	35024
Machinery Mechanic	41183
Machinist General	42845
Maintenance Helper	27107
Maintenance Worker	33690
Market Research Analyst	53762
Materials Handler	28426
Mechanical Engineer	63990
Medical Lab Technician	34308
Messenger	23464
Millwright	43554
Office Manager	53383
Order Clerk	30832
Painter/Paperhanger	39070
Payroll Clerk	34130
PC Specialist	44958
Personnel Analyst	50555
Personnel Clerk	33648
Pharmacist	74331
Physical Therapist	56604
Physician	124833
Physicist, PhD	80044
Plumber	47090
Primary School Teacher	46570
Production Supervisor	58753
Property Manager	48886
Receptionist	26818
Registered Nurse	52444
Sales Representative	48927
Secondary School Teacher	48139
Secretary	30714
Secretary to CEO	52046
Security Guard	30420
Shipping Clerk	31521
Stationary Engineer	51332
Systems Analyst	64766
Systems Analyst Lead	79824
Tool & Die Maker	46260
Warehouse Worker	35027
Welder	36438
Word Processor	33528

(Canadian dollars)



## eDOT Supplement

The enhanced  
Dictionary of

## Announcing a Ten Year ERI Commitment

## Occupational Titles

The King James version of *The Bible* references a King in 2 Kings 20:12 ("At the time of King Berodach-baladan son of Baladan of Babylon..."). Some biblical scholars consider this to be a misspelling. The correct spelling is believed to be "*Merodach-baladan*" (also known as *Marduk-apalid-dina*). Regardless of scholarly debates, the misspelling has been retained in the King James version since the 1600s. That same can be said of the *U.S. Dictionary of Occupational Titles* which is famous for its misspellings and missed job analyses (garden/nursery positions that don't require crawling, plastic surgeons not needing depth perception, etc.) Some argue that the U.S. government created an editing system that led to organizational lockjaw, making change impossible. Others suggest that no one ever had the courage to change mistakes. Whatever the reasons, the DOT has been replaced by O\*NET. This section describes the methodology by which ERI is now saving, correcting and changing the old DOT.

ERI's January 2003 Platform Library contains an evolving beta edition of ERI's eDOT. It will allow users to quickly compare the old DOT against the new. Readers should assume that almost all jobs have changed or will change as to their descriptions, alternative titles, industry classifications and worker characteristics (and spell-checked). The last real edit of the old DOT occurred in 1977, a year when there were no fax machines, no personal computers in offices, no email (this list too is endless). An example: the DOT description for automobile mechanic does not have a task: *work with computer diagnostics*. We have changed that. The new eDOT description does contain 'computer diagnostics'; and for those who must "see to believe," all eDOT jobs will have a video of the work being performed!

Unlike the old DOT, eDOT also contains a record of the "rate of error" for each job characteristic measure. Required by "Daubert" for any use in court (in the U.S.), the rate refers to the standard deviation from the collection of job analysis data at the field audit level. Example: ten Field Auditors measure the same job: 7 state a job requires heavy lifting 2/3 of the time, 2 record 1/3 of the time, 1 reports "none." The Standard Deviation = .70 for a reported measure of 2/3.

$$xbar = [(7) + 2] + (1)(1)/10 = 2.6$$

$$n = 10$$

$$s = [(7(3 - 2.6)^2 + 2(2 - 2.6)^2 +$$

$$1(1 - 2.6)^2)/9]^{1/2}$$

$$s = [(7(0.4)^2 + 2(0.8)^2 + 1(1.6)^2)/9]^{1/2}$$

$$s = [(7(0.16) + 2(0.36) + (2.56))/9]^{1/2}$$

$$s = [(1.12 + 0.72 + 2.56)/9]^{1/2}$$

$$s = [4.40/9]^{1/2}$$

$$s = [0.4889]^{1/2}$$

$$s = 0.6992$$

## eDOT Courses

Two new courses have been added to the ERI Distance Learning Center (DLC) catalog:

- O\*Net, DOT, and the eDOT
- The U.S. Social Security Administration's Historic Use of the DOT in Determining Disability Status

ERI's DLC has been approved for *recertification PHR and SPHR credit hours* through the Human Resource Certification Institute (HRCI) of the Society of Human Resource Management (SHRM). For CPA and CPE credits, search "salary" at [www.cpemarket.com](http://www.cpemarket.com), the National Association of State Boards of Accountancy's site.

## eDOT Databases Fields

## Source Code for Every Source

Active = 1, Not found in economy = 0

ERI Number - 5 digits

DOT Number - 9 Digits

DOT Job Title

DOT space - use Code 14-19

4th Digit DOT Code

4th Digit DOT Code

5th Digit DOT Code

6th Digit DOT Code

7th Digit DOT Code

8th Digit DOT Code

9th Digit DOT Code

10th Digit DOT Code

11th Digit DOT Code

12th Digit DOT Code

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35th Digit DOT Code

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37th Digit DOT Code

38th Digit DOT Code

39th Digit DOT Code

40th Digit DOT Code

41st Digit DOT Code

42nd Digit DOT Code

43rd Digit DOT Code

44th Digit DOT Code

45th Digit DOT Code

## Exposure to Weather

Extreme Cold

Extreme Heat

Hot and/or Humid

Noise Intensity Level

Vibration

Atmospheric Conditions

Injury from Moving Parts

Exposure to Electrical Injury

Exposure to Injury from Fall

Exposure to Radiation

Injury from Explosive

Exposure to Toxic Chemical

Other Environmental Conditions

Materials, Products, Subject Matter or Service 01

Materials, Products, Subject Matter or Service 02

Materials, Products, Subject Matter or Service 03

Skill and Experience 01

Skill and Experience 02

Skill and Experience 03

Skill and Experience 04

Skill and Experience 05

Skill and Experience 06

Skill and Experience 07

Skill and Experience 08

Skill and Experience 09

Skill and Experience 10

Skill and Experience 11

Skill and Experience 12

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Skill and Experience 94

Skill and Experience 95

Skill and Experience 96

Skill and Experience 97

Skill and Experience 98

Skill and Experience 99

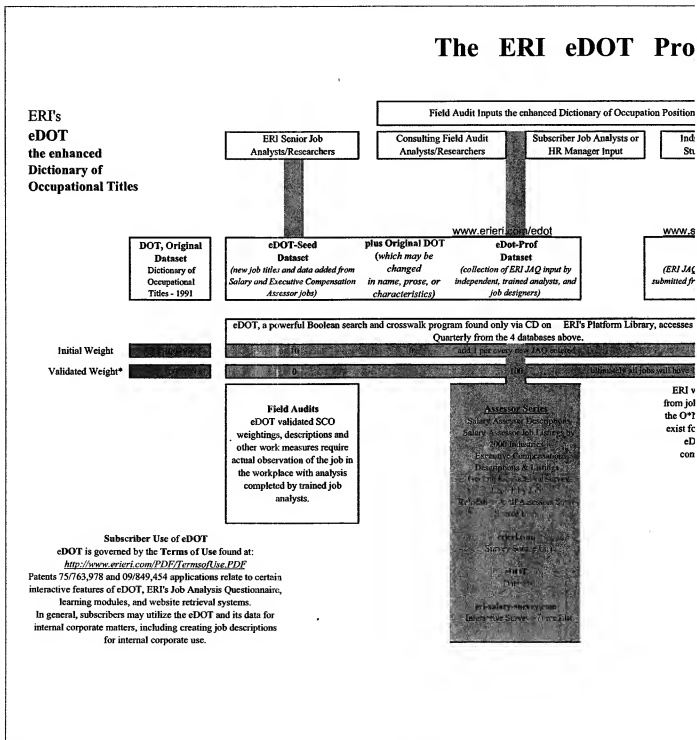
Skill and Experience 100



## eDOT, Job Analysis and Field Audits

It is reported that one reason the U.S. Government decided to abandon the Dictionary of Occupational Titles was that it became too costly to maintain believes it possible (although that belief is untested) for it to enhance the DOT and attain the validation that can only be obtained with the use of field servers; and it has the advantage of both in-house, windows-based and web application developers. Twelve different programming languages are used in the flowchart below, you will notice that at the right, we include [www.eri-salary-survey.com](http://www.eri-salary-survey.com) and its collection and analyses of available salary surveys

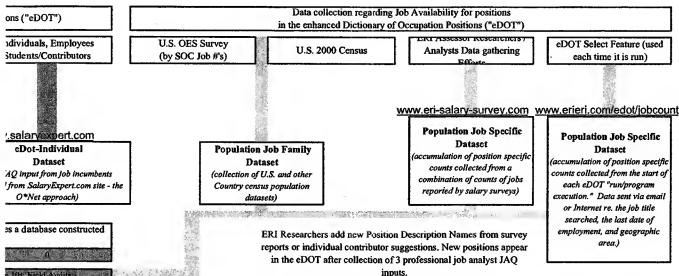
## The ERI eDOT Pro



# Project Notes

in the field audit staff required to continually review and update job descriptions. (There were other reasons discussed in previous ERI Updates.) ERI job analysts' actual observation of job performance. Part of this belief is based on the fact that ERI maintains its own file servers and backup system to produce ERI's Platform Library each quarter; each involves coordinating programming and research teams. For those interested in reading more, we believe this collection of data derives the only known estimate of "incumbents in specific jobs" in the U.S., Canada and U.K.

## Object



### Application for Disability and Transferable Skills Assessment

1. Determine the Work Characteristics of the Present Job (at Disability)
2. Identify Present (reduced) Work Abilities
3. Identify Work Characteristics/Skills of Jobs Held in Previous 15 years
4. Identify eDOT Jobs within eDOT within occupational area and industry(ies)
5. Identify among these eDOT jobs those fitting reduced abilities
6. Assess if these jobs are available in either the national or local economy
7. Identify likely employers and contacts where these jobs might exist

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# INTERNET INFORMATION

## New Web Sites

With the expansion in the breadth and depth of free ERI research datafiles, we have divided our Internet sites into subject specific independent sites. This should allow subscribers to go directly to the subject matter that is of most interest. So, in addition to ERI's home page at [www.eri-erl.com](http://www.eri-erl.com) and the ERI Distance Learning Center at [www.eri-dlc.com](http://www.eri-dlc.com), we have created:

### [www.eri-erl.co.uk](http://www.eri-erl.co.uk)

Order British and Eurozone Geographic and Salary Assessor editions from this site. (Belgium has been added for January, joining the U.K. and the Netherlands.) April 2003's edition will include an Executive Compensation Assessor (for the U.K. only, Germany and France data will follow). Geographic differentials in the U.K. exceed any of those found in the U.S.



### [www.eri-nonprofit-salaries.com](http://www.eri-nonprofit-salaries.com)

This data is provided for charities that would otherwise, because of budget constraints, be unable to access competitive data. Jobs included are those that relate directly to nonprofits. This data may now be accessed for free from ERI's Platform Library CD-ROM (go to [www.eri-erl.com](http://www.eri-erl.com) and select the Full Demo Download icon). This application may be run without an Internet connection.



### [www.eri-salary-survey.com](http://www.eri-salary-survey.com)

2003 Salary Increase Plans reported by subscribers have decreased monthly since March of 2002, as business has become more and more conservative. Review merit increase plans for your industry, planning date and geographic region. Data is free to survey participants and Assessor Series subscribers.



### [www.eri-executive-compensation.com](http://www.eri-executive-compensation.com)

The fallout from Enron, Worldcom and Arthur Andersen's demise is revolutionizing executive compensation. Board and stockholder scrutiny is at an all-time high. The 30-year old fabric of capital accumulation plans appears destroyed. The ERI/WSJ Index (below) for this Quarter illustrates the shift toward direct pay (salaries and annual incentives).



## Planned '03 Merit Salary Increases

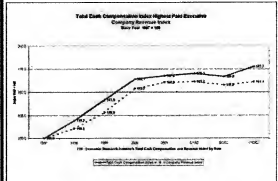
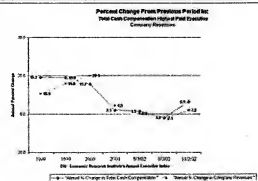
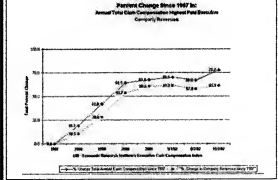
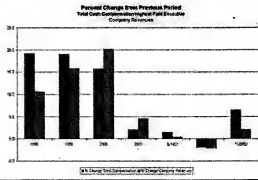
US	
Wage	3.4%
Salary	3.6%
Management	3.8%

Canada	
Wage	2.7%
Salary	2.9%
Management	3.0%

UK	
Wage	3.1%
Salary	3.2%
Management	3.4%

Euro Countries	
Wage	3.4%
Salary	3.5%
Management	3.9%

Data shown as of 11/30/02; see [www.eri-erl.com](http://www.eri-erl.com) for latest updates. Values change as data is collected. Each new month of 2003 now decreasing values.



# ERI PRODUCT ORDER SHEET

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# INSTALLATION GUIDELINES

## NEW SUBSCRIBERS: ORDER AND INSTALL ERI'S SOFTWARE FROM THE INTERNET

For those who have access to the Internet, all of ERI's software products may be purchased, downloaded and installed from [www.eri-ri.com](http://www.eri-ri.com).

1. From ERI's home page click "Subscribe/Order" (left-hand side, top).
2. Complete the required information and follow the instructions to download and install the applications.

ERI's Platform Library & DLC Wizard may also be downloaded and installed from the Internet (at no charge).

1. On the left-hand side of ERI's website click "Full Demo Download"
2. Complete the registration information and download.

## CURRENT SUBSCRIBERS: UPDATE ERI'S SOFTWARE FROM CD-ROM

1. Run ERI's Platform Library & DLC Wizard CD-ROM (see related instructions).
2. You will be prompted automatically to update the Assessor Series software and databases to the new quarterly release. Follow the instructions as they appear on your screen. Unless you change PCs during your subscription year, you will not need to re-enter a license code.

## CURRENT SUBSCRIBERS: UPDATES FROM THE INTERNET

1. Go to [www.eri-ri.com](http://www.eri-ri.com).
2. Click "Subscriber Dataset Updates."
3. Scroll down the screen and click on the Assessor Series product you would like to update.

*(Note: It is not necessary to run an installation using a license code each quarter. If you have installed using a license code during the current subscription year at least once, then you should utilize the "automatic update" for all of the following quarters.)*

If you are a new subscriber, please click "Install" when prompted. If you are a returning subscriber, please click "Yes" to upgrade when prompted. If you have recently purchased an upgrade to your subscription and need to install using a new license code, go to the main screen and select the To Install | Install Assessors Using License Code menu.

## HOW TO RUN ERI'S PLATFORM LIBRARY & DLC WIZARD CD-ROM

1. Check the date printed on the front of the CD-ROM to make sure that it is for the most recent quarter.
2. Place the CD-ROM in your CD-ROM drive and shut the drive door.
3. The CD-ROM should auto-run. (Approximately 5 seconds after you close the drive door, the CD-ROM drive light should start to blink and you should hear the CD-ROM running. After another 5 - 10 seconds, you should see ERI's Platform Library.)

If after 30 seconds the CD-ROM does not auto-run, please contact your organization's internal technical support department. Something may be wrong with your CD-ROM drive or the device drivers. Try to run the CD-ROM on another computer or try using the following secondary procedure:

1. Click the Windows Start button, then click Run.
2. Type d:\eri.exe (assuming that d:\ is your CD-ROM drive).

## GENERAL INSTALLATION INFORMATION

ERI's software applications are designed to run on Windows 98, NT, 2000, ME and XP. Each quarter, a CD-ROM is mailed to subscribers from which all software applications may be installed. In addition, all software applications may be downloaded and installed from the Internet. For more information on installation options, please select **Help | Topic Search** from any of ERI's software applications and search for related topics using the keyword "Installation," or visit ERI's Online Technical Support at [www.eri-ri.com/techsupport/](http://www.eri-ri.com/techsupport/). Better yet, sign up for a Thursday morning one-hour telephone conference symposium at [www.eri-ri.com](http://www.eri-ri.com). Call us anytime at (800) 627-3697.

The screenshot shows the ERI Economic Research Institute website. On the left is a 'Subscribe/Order' form with fields for Geographic, Salary, Education, Executive Compensation, and References. On the right is a 'Distance Learning Center' section with a list of courses and a 'View the CD-ROM' link. Below the courses is a 'Save Time and Expense by Training Online' section with a 'View the CD-ROM' link. At the bottom right is a 'Specialized Executive & Management' section with a 'View the CD-ROM' link.

4. Follow the instructions as they appear on your screen to download the update application. Once it has downloaded, you will need to execute this file to install your update.

The screenshot shows the ERI Economic Research Institute website. On the left is a 'Distance Learning Center' section with a list of courses and a 'View the CD-ROM' link. Below the courses is a 'Save Time and Expense by Training Online' section with a 'View the CD-ROM' link. At the bottom right is a 'Specialized Executive & Management' section with a 'View the CD-ROM' link.